Retention and Classification Report

Agency: Logan School District (Utah) (595)

101 West Center Street Logan, UT 84321 435-755-2301

Records Officer Susanne Kuresa

22313	Audit reports
27240	Personnel records
22312	School board minutes
25519	Special education student files
26563	Student cumulative files

Page: 1

AGENCY: Logan School District (Utah)

SERIES: 22313

TITLE: Audit reports
DATES: 1917-

ARRANGEMENT: Chronological

DESCRIPTION:

These are reports prepared by external auditors examining and verifying the school district's financial activities for the year. "The audit required for any fiscal year shall be completed within six calendar months after the close of the fiscal year" (UCA 51-2-2 (1995)). The audit is required to include "the financial statements; the auditor's opinion on the financial statements; a statement by the auditor expressing positive assurance of compliance with state fiscal laws identified by the state auditor; a copy of the auditor's letter to management that identified any material weaknesses in internal controls discovered by the auditor and other financial issues related to the expenditure of funds received from federal, state, or local governments to be considered by management; and management's response to the specific recommendations" (UCA 51-2-3(1) (1995)).

RETENTION:

Retain until microfilmed.

DISPOSITION:

Retain in agency custody.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 5, Item 4.

AUTHORIZED: //

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office until microfilmed and then destroy provided microfilm has passed inspection.

Page: 2

AGENCY: Logan School District (Utah)

SERIES: 22313

TITLE: Audit reports

(continued)

Microfilm master: Retain in State Archives permanently.

Microfilm duplicate: Retain in State Archives permanently with

authority to weed.

APPRAISAL:

Administrative Fiscal Historical

Audit reports may be used during the next audit cycle to monitor compliance with internal control program recommendations. They document agency functions and have research value.

PRIMARY CLASSIFICATION:

Public UCA 51-2-3(3) (2008)

Page: 3

3

AGENCY: Logan School District (Utah)

SERIES: 27240

TITLE: Personnel records

DATES: 1930-

ARRANGEMENT: Chronological by estimated last year of employment, thereunder

alphabetical

ANNUAL ACCUMULATION: 4.00 cubic feet.

DESCRIPTION:

These are the personnel files for all district employees. They are used to document employment. The files include the employment applications, authorizations for hire forms, placement records, employee history card, copies of school transcripts, pay and leave history, work performance, in-service training completion certificates and credits, evaluation records, teaching certificates, previous teaching experience, contracts, lane change requests, and related correspondence. May also include fingerprints and verification of the criminal background check.

RETENTION:

Retain 65 years.

DISPOSITION:

Destrov.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule 94, Item 1.

AUTHORIZED: 05/28/2009

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 10 years and then transfer to State Records Center. Retain in State Records Center for 55 years and then destroy.

Page: 4

AGENCY: Logan School District (Utah)

SERIES: 27240

TITLE: Personnel records

(continued)

APPRAISAL:

Administrative

Personnel files are kept for administrative purposes.

PRIMARY CLASSIFICATION:

Private

Page: 5

3

AGENCY: Logan School District (Utah)

SERIES: 22312

TITLE: School board minutes

DATES: 1872-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.40 cubic feet.

DESCRIPTION:

These are minutes of regular and special meetings of the Board of Education. They are used to document the actions and decisions of the Board. School board minutes record the adoption of annual budgets; the approval of expenditures; discussions of district policies. These minute books include the time and place of meeting, board members absent and present, summary of proceedings and decisions made by the board.

RETENTION:

Retain until microfilmed.

DISPOSITION:

Retain in agency custody.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 15, Item 2.

AUTHORIZED: //

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office permanently after being microfilmed.

Microfilm master: Retain in State Archives permanently with authority to weed.

Microfilm duplicate: Retain in Office permanently.

Microfilm duplicate: Retain in State Archives permanently with authority to weed.

Page: 6

AGENCY: Logan School District (Utah)

SERIES: 22312 TITLE: School board minutes

(continued)

APPRAISAL:

PRIMARY CLASSIFICATION:

Public

Page: 7

AGENCY: Logan School District (Utah)

SERIES: 25519

TITLE: Special education student files

DATES: 1997-

ARRANGEMENT: Chronological by student's last date of service, thereunder

alphabetical by student's surname

ANNUAL ACCUMULATION:

DESCRIPTION:

These files document students enrolled in the district's special education programs in accordance with the provisions of 34 CFR 300.560-300.577 (2003). The records are required to receive federal and state special education funding. Services can be discontinued when student is reclassified as no longer needing special education services, the student moves, or refuses the services. They contain various reports and completed forms including individual education program records (IEPs), inspection logs, evaluation and re-evaluation forms, parental approval forms, test protocols, parent surveys, parent information, third party information, placement documents, refusal of services forms, and other legal documents required by federal regulations and state rules to verify a student's disability and need for special education services.

RETENTION:

Retain 6 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series were specifically approved by the State Records Committee.

APPROVED: 11/2004

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year after last date of special

Page: 8

AGENCY: Logan School District (Utah)

SERIES: 25519

TITLE: Special education student files

(continued)

education received and then transfer to State Records Center. Retain in State Records Center for 5 years and then destroy.

APPRAISAL:

Administrative Legal

This disposition is based on the legal requirements specified in 34 CFR 300.562 (2004) and the recommendations of the State Office of Education. A student can receive special education services until the age of twenty-one.

PRIMARY CLASSIFICATION:

Exempt 34 CFR 300.562 (2008); 34 CFR 99 (2008)

Page: 9

3

AGENCY: Logan School District (Utah)

SERIES: 26563

TITLE: Student cumulative files

DATES: 2002-

ARRANGEMENT: Alphabetical by name.

ANNUAL ACCUMULATION:

DESCRIPTION:

These student files contain information on students attending school in the district. They are used to document student's attendance. They contain the copies of achievement test scores, the official transcript, copies of report cards, health records, and immunization cards. They are also called student cumulative cards.

RETENTION:

Retain 3 years after graduation.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 17, Item 2.

AUTHORIZED: 07/06/2007

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year after graduation and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy provided official transcript has been pulled and retained.

Page: 10

AGENCY: Logan School District (Utah)

SERIES: 26563

Student cumulative files TITLE:

(continued)

APPRAISAL:

Administrative

PRIMARY CLASSIFICATION:

Family Educational Rights and Privacy Act 20 U.S.C.1232g (2008); 34 CFR part 99 (2008) Exempt